

Department of Information Technology (DoIT)
Request for Approval of an Option Exercise
(Renewal) Checklist

I. Contract/Task Order Option Exercise Submission Package (items must be provided with the agenda by the DoIT submission cut-off date if BPW approval required):

1. Copy of the page(s) from the contract/task order agreement containing the option language.
2. Copy of either:
 - a. The notification to the contractor of the Agency's intent to exercise the renewal, contingent upon DoIT/BPW approval. (Preferred)
 - b. The proposed notification to the contractor that the renewal option is being exercised. (This should be a draft only. This notification should not actually be sent until DoIT/BPW approval has/have been obtained.)
3. Properly executed Renewal BPO (Preferred) or Change Order entered into ADPICS with correct approval paths (*includes BPW approval, Department D05, if applicable) and including all Crosswalk information and MBE screen (PHCL 2345) filled in.
4. Provide an Option Justification - A statement explaining why the renewal option is recommended in lieu of a new procurement to obtain better pricing through competition. Justify why it is in the State's best interest to exercise the option in terms of quality of service, good pricing or any other applicable factor.
5. Provide a Price Justification - a written justification that explains why the pricing is fair and reasonable. This may include rate comparisons with recent, similar awards; comparisons with intergovernmental contracts, application of the Consumer Price Index inflation rate, etc.
6. Newly signed Contract Affidavit for the Option Period. **New!**

Also, as applicable:

7. BPW Agenda Item for Option Period exercise if valued over \$200,000 or exercise of the Option Period will collectively render total contract value over \$200k.
8. If the option being exercised is the last renewal option on the contract and the information technology (IT) activity is still needed, submit a plan for re-procuring with a timeline.
9. If the original contract contains an MBE participation goal, provide a document showing the goal and as of the submission of the request for approval of the renewal:
 - a. The total payments made to the contractor(s),
 - b. The total payments made to the MBE subcontractor(s), and
 - c. The percentage of the payments made to the subcontractor(s) compared to the payments made to the contractor(s).
 - d. If the MBE Goal is not being met, provide the prime contractor's plan to remedy MBE goal compliance. **New!**
10. If Retroactive, provide the justification for any retroactive request, signed by the Agency Head (Forgiveness letter). For retroactive options under a Master Contract, the letter shall be addressed to the Assistant Secretary for Administration of DoIT. All others to the Board of Public Works **New!**